IM Regionalization and ESC Transition Requirements Matrix

Requirement Title	Description	Notes	Phase	Implementation Status	Scheduled Date
1 IM Regionalization and ESC Transition System Requirements (1)	This document contains the complete list of system requirements for the IM Regionalization and ESC Transition projects. Deloitte will make enhancements to the existing system for all the items listed in this matrix	All existing functionality of the CARES system will remain as-is unless noted otherwise within this requirements matrix.	Current	Implemented	
1.1 Intake, Application/Change/Renewal/SMRF Inbox Management and Processing (2)	The Cares Worker Web (CWW) sub systems for Intake, Application/Change/Renewal/SMRF Inbox Management and Processing should be enhanced to support the IM Regionalization model		Current	Implemented	
1.1.1 Application Inbox and Processing (3)	CWW should be enhanced to allow a consortium worker to manage the Application Inbox at the agency level as well as the IM consortium level		Current	Implemented	
1.1.1.1 Search Application Inbox by agency (4)	CWW should retain the ability to allow searching through the Application Inbox by agency		Current	Implemented	
1.1.1.2 Assign/Reassign Application Inbox items by agency (5)	CWW should retain the ability to allow assignment/reassignment of Application Inbox items by agency		Current	Implemented	
1.1.1.3 Search Application Inbox by consortia (6)	CWW should be enhanced to allow searching through the Application Inbox by consortia		Current	Implemented	
1.1.1.4 Assign/Reassign Application Inbox items by consortia (7)	CWW should be enhanced to allow assignment/reassignment of Application Inbox items after searching by consortia	An application/RFA can currently only be assigned to a worker and office within the county where it is present. Workers cannot reassign apps/RFAs outside their county.	Future	Scheduled	04/27/2012
1.1.1.5 Search Application Inbox by multiple agencies within a consortium (8)	CWW should be enhanced to allow searching through the Application Inbox by multiple agencies within a consortium selected by the worker in the search criteria		Current	Implemented	
1.1.1.6 Display more than 250 results in the Search Listing (9)	The CWW Application Inbox should be enhanced to display more than 250 search results		Future	Outstanding	
1.1.1.7 Allow Reassignment of 50 items at a time (10)	The CWW Application Inbox should be enhanced to allow Reassignment of 50 items at a time.		Current	Implemented	
1.1.1.8 Remove restriction to search assigned applications/RFAs by a worker ID (11)	CWW should be enhanced to allow searching for assigned applications/RFAs through the Application Inbox without specifying a worker ID		Current	Implemented	
1.1.1.9 Routing of ACCESS applications to the county of residence (12)	ACCESS should continue to route applications to the Application Inbox of the county of residence specified in the application for all agencies including those which have opted out of IM Regionalization		Current	Implemented	
1.1.1.10 Sorting by county on the Search Listing page (13)	CWW should display "County" on the Application Inbox Search Listing page and allow a worker to sort by it		Current	Implemented	
1.1.1.11 Sorting by worker ID on the Search Listing page (14)	CWW should be enhanced to display "Assigned Worker ID" on the Application Inbox Search Listing page and allow sorting by it		Current	Implemented	
1.1.2 Change/Renewal/SMRF Inbox and Processing (15)	CWW should be enhanced to allow a consortium worker to manage the Change/Renewal/SMRF Inbox at the agency level as well as at the IM consortium level		Current	Implemented	
1.1.2.1 Search Change/Renewal/SMRF Inbox by agency (16)	CWW should retain the ability to allow searching through the Change/Renewal/SMRF Inbox by agency		Current	Implemented	
1.1.2.2 Assign/Reassign Change/Renewal/SMRF Inbox items by agency (17)	CWW should retain the ability to allow reassignment of Change/Renewal/SMRF Inbox items after searching by agency		Current	Implemented	
1.1.2.3 Search Change/Renewal/SMRF Inbox by consortia (18)	CWW should be enhanced to allow searching through the Change/Renewal/SMRF Inbox by consortia		Current	Implemented	
1.1.2.4 Assign/Reassign Change/Renewal/SMRF Inbox items by consortia (19)	CWW should be enhanced to allow reassignment of Change/Renewal/SMRF Inbox items after searching by consortia	A Change/Renewal/SMRF can be assigned to any worker within the Consortium	Current	Implemented	
1.1.2.5 Search Change/Renewal/SMRF Inbox by multiple agencies (20)	CWW should be enhanced to allow searching through the Change/Renewal/SMRF Inbox by multiple agencies within a consortium selected by the worker in the search criteria		Current	Implemented	
1.1.2.6 Search assigned Change/Renewal/SMRF Inbox items by multiple worker IDs (21)	CWW should be enhanced to allow searching through the Change/Renewal/SMRF Inbox by multiple worker IDs		Current	Implemented	
1.1.2.7 Display more than 250 results in the Search Listing (22)	The CWW Change/Renewal/SMRF Inbox should be enhanced to display more than 250 search results		Future	Outstanding	
1.1.2.8 Allow Reassignment of 50 items at a time (23)	The CWW Change/Renewal/SMRF Inbox should be enhanced to allow Reassignment of 50 items at a time		Current	Implemented	

1.1.2.9 Sorting by county on the Search Listing page (24)	CWW should display "County" on the Change/Renewal/SMRF Inbox Search Listing page and allow a worker to sort by it		Current	Implemented
1.1.2.10 Sorting by worker ID on the Search Listing page (25)	CWW should be enhanced to display "Assigned Worker ID" on the Changes/Renewals/SMRFs Inbox Search Listing page and allow sorting by it		Current	Implemented
1.1.2.11 Search by Primary Person name on the Changes/Renewals/SMRFs Inbox (26)	CWW should provide a search criteria by the First letter of Primary Person's last name on the Changes/SMRFs/Renewals Inbox	This system change would help in dividing and distributing Renewals/Changes/SMRFs in a team based work model	Current	Implemented
1.1.3 Case Intake and Transfer (27)	CWW should be enhanced to allow workers to manage the Case Intake and Case Transfer functions at the agency as well as consortium level		Current	Implemented
1.1.3.1 Edit to recommend change of county of residence on address change (28)	CWW should be enhanced to include an edit on the Address Verification page after an address change whenever there is a difference between the household County of Residence and post office suggested County of Residence.		Current	Implemented
1.1.3.2 Collection of Telephonic Signatures during Client Registration (29)	CWW should be enhanced to allow a consortium worker to link a telephonic signature recording to an RFA during the Client Registration process	Recording of the Telephonic Signature would be done through CCA and not through CWW	Current	Implemented
1.1.3.3 Collection of Telephonic Signatures during Application Processing (30)	CWW should be enhanced to allow a consortium worker to link a telephonic signature recording to a case during the Application Processing	Recording of the Telephonic Signature would be done through CCA and not through CWW	Current	Implemented
1.1.3.4 Collection of Telephonic Signatures during Case Review (31)	CWW should be enhanced to allow a consortium worker to link a telephonic signature recording to a case during Case Review	Recording of the Telephonic Signature would be done through CCA and not through CWW	Current	Implemented
1.1.3.5 Impact on County of Residence by a Case Transfer within a consortium (32)	The system should provide the worker the option of changing the County of Residence or keeping it the same when transferring an IM-only case within a consortium. When the case is transferred to a county out of a consortium, the county of residence is forced to change.	See section 1.1.5 for details on restrictions of mixed cases. Potential worker training need: Keeping different County of Residence and County of Administration for a case might have an impact on the HMO enrollment for the case individual	Current	Implemented
1.1.3.5.1 Impact on County of Residence by a Case Transfer to a tribal agency (33)	The system should allow the worker to select the County of Residence for a case which is being transferred to a tribal agency. The County of residence field on the Agency Transfer page should not display the list of tribes		Current	Implemented
1.1.4 RFA Creation, Transfer and Processing (34)	CWW should be enhanced to allow workers to manage the RFA Creation, Transfer and Processing functions at the agency as well as consortium level		Current	Implemented
1.1.4.1 Creating and Transferring an RFA (35)	CWW should retain the ability to allow a worker to create an RFA and transfer it to any other agency in the state		Current	Implemented
1.1.4.2 Transferring an RFA as an unassigned item to the Application/Inbox (36)	CWW should be enhanced to allow transferred RFAs to go the Application/RFA inbox as unassigned items instead of being assigned to the Transfer Coordinator of the destination agency	July 2012 item	Future	Implemented
1.1.4.3 Processing an RFA in a consortium (37)	CWW should retain its existing capability to allow a worker to process any RFA to a new case within their IM consortium by either of the following ways: 1) The worker manually transfers the RFA to his own agency A and assigns the case to himself (the worker may manually transfer the case back to the original agency B after processing it) 2) The worker from agency A keeps the RFA in its original agency B and manually assigns the ID of an agency B worker to the RFA while processing it	See section 1.1.5 for details on restrictions of mixed RFAs.	Current	Implemented

1.1.4.3.1 Processing an RFA in a consortium (Future Enhancement) (38)	As a future enhancement, the system could be enhanced in the following possible ways to allow workers to process an RFA belonging to any agency within the consortium: 1) Automatic transfer of the RFA into the worker's agency A when the worker specifies his own ID and tries to process the RFA in agency B (the worker may manually transfer the case back to the original agency B after processing it) 2) The RFA remains in its own agency B and there is an automatic assignment of the RFA/case to the Transfer Coordinator of the same agency B when a worker from a different agency A processes it		Future	Scheduled	04/27/2012
1.1.4.4 Impact on County of Residence by an Application/RFA Transfer (39)	The system should continue to change the County of Residence to the County of Administration of the county agency where an Application/RFA is being transferred. While transferring an Application/RFA to a tribal agency, the County of Residence should not be changed		Current	Implemented	
1.1.4.5 RFA Comments (40)	The RFA Comments section should be enhanced to provide better tracking of worker comments		Current	Implemented	
1.1.4.5.1 RFA Comments field limit (41)	CWW should be enhanced to allow each comment added to an RFA to be a maximum of 1000 characters (current limit=250 characters)		Current	Implemented	
1.1.4.5.2 RFA Comments Additional Information (42)	The CWW RFA Comments field should be enhanced to display the date of the comment and worker ID who posted the comment		Current	Implemented	
1.1.4.5.3 Multiple RFA Comments (43)	The RFA Comments section should be enhanced to allow multiple worker comments to be posted and tracked		Current	Implemented	
1.1.4.5.4 Better tracking of comments on converting RFA to a case (44)	The information about the worker who posted the RFA comment and the date when the comment was posted should be accurately copied to the case when the RFA gets processed to a new case or merged with an existing case		Current	Implemented	
1.1.5 Processing Cases, Applications and RFAs with mixed DHS and DCF programs (45)	The system should support processing of Cases, Applications and RFAs with mixed DCF and DHS programs by workers		Current	Implemented	
1.1.5.1 Transferring of mixed cases outside of County of residence (46)	The system should display a hard edit to not allow a case to be transferred outside the household's County of residence if CC or W2 programs are open, have been closed in the past 6 months, have been requested, or the case has an active W2 placement assignment. The case can be transferred if there is a change to the case individual's County of residence	6 months limit is suggested for W2 and CC	Current	Implemented	
1.1.5.2 Edit on the Case Program Requests pages (47)	CWW should display a hard edit on the CC and W2 Program Request pages if either program gets requested and the case is being managed outside of the household's county of residence.		Current	Implemented	
1.1.5.3 Transferring of mixed applications outside of County of residence (48)	The system should display a hard edit to prevent transferring an application with a CC or W2 program request outside the applicant's county of residence unless there is a change to the individual's County of residence		Future	Scheduled	04/27/2012
1.1.5.4 Transferring of mixed RFAs outside of County of residence (49)	The system should display a hard edit to prevent transferring an RFA with a CC or W2 program request outside the applicant's County of Residence unless there is a change to the individual's County of residence		Future	Scheduled	04/27/2012
1.1.5.5 Processing of mixed RFAs outside of County of residence (50)	The system should display a hard edit to prevent any RFA created with a CC or W2 request to be processed to a case that is managed outside of the household's county of residence		Current	Implemented	
1.1.5.6 Merging of a mixed RFA into an existing IM case (51)	If an RFA for CC or W2 needs to be linked or merged with an existing case, the system must require that the case is managed in the household's county of residence prior to linking or merging the RFA with the case.	If the existing case is a closed IM case, the county of residence of the case gets updated to the RFA's County of residence	Current	Implemented	
1.1.5.7 Edit on the RFA Program Requests page for processing a mixed RFA (52)	The system should display a hard edit on the RFA Program Requests page to prevent a worker from entering a request for CC or W2 if the RFA is not assigned to the same county as the household's county of residence.	If a client walked into or called an agency outside of the client's county of residence and requested CC or W2, the agency worker - by policy - should direct the client to the appropriate agency for purposes of client registration unless the agency is in the W2 geographical region of the client's county of residence.	Future	Scheduled	04/27/2012

1.1.5.8 Relaxing the restrictions for leveling mixed W2 cases for certain counties (53)	The system should support the ability to allow W2 cases to be managed outside the household's county of residence for a specific set of agencies defined in a configurable reference table even if W2 program is open, has been closed in the past 6 months, has been requested, or the case has an active W2 placement assignment.	This restriction will be relaxed only for specified agencies with respect to every agency; There are currently no plans for January to enable this functionality for specific agencies.	Current	Implemented
1.2 Caseload Management, Workload Management, Alerts Management and Processing (54)	The Cares Worker Web functions for Caseload Management, Workload Management, Alerts Management and Processing should be enhanced to support the IM Regionalization model		Current	Implemented
1.2.1 Caseload Management (55)	CWW should be enhanced to allow workers to manage the Caseload Management functions at the agency as well as consortium level		Current	Implemented
1.2.1.1 Monitoring Verification Due Dates (56)	The system should be enhanced to allow searching for cases by verification due date (specific date or range) within a consortium on the Caseload Management Search page for purposes of monitoring verification due dates.	This enhancement will help Change Centers manage verification due dates for ongoing cases that have reported changes.	Current	Implemented
1.2.1.2 Search Caseload Management page by consortia (57)	CWW should be enhanced to allow searching through the Caseload Management page by consortia		Current	Implemented
1.2.1.3 Search Caseload Management by multiple agencies within a consortium (58)	CWW should be enhanced to allow searching through the Caseload Management page by multiple agencies within a consortium selected by the worker in the search criteria		Current	Implemented
1.2.1.4 Search Caseload Management by agency (59)	CWW should retain the ability to allow searching through the Caseload Management page by agency		Current	Implemented
1.2.1.5 Retrieve Caseload Management information beyond 90 days filing date (60)	The CWW Caseload Management page should be enhanced to allow all agency/consortia searches to retrieve cases with any filing date	Per the existing logic, the Caseload Management tool will not include cases closed more than a month in the past or denied (closed) more than 30 days in the past	Current	Implemented
1.2.1.6 Search Caseload Management page by programs (61)	The CWW Caseload Management page should be enhanced to allow searching by programs	The Caseload Management tables are updated nightly by a batch process and might not always contain real-time information. However, triggers can be added to update the table real-time whenever there is: 1) A change in the due date made on the Verification Due Date page 2) On all the Program Requests pages, when the request for a program is changed	Future	Outstanding
1.2.1.7 Search Caseload Assignment page by programs (62)	The CWW Caseload Assignment page should be enhanced to allow searching by programs	For performance reasons, restrictions might need to be implemented to not allow searches by programs on any caseloads having more than a certain large number of cases	Future	Outstanding
1.2.1.8 Retrieve caseload counts by worker on the Caseload Assignment page (63)	The system should include the ability to retrieve caseload counts by worker on the Caseload Assignment page		Current	Implemented
1.2.1.9 Search Caseload Assignment page for cases closed more than 30 days ago (64)	The CWW Caseload Assignment page should be enhanced to specifically retrieve cases closed more than a calendar month in the past or denied (closed) more than 30 days in the past.	The current functionality retrieves all cases that are closed, regardless of when it closed. This enhancement will help workers move old closed cases to a separate caseload.	Current	Implemented
1.2.2 Alerts Management and Processing (65)	CWW should be enhanced to allow workers to manage the Alerts Management and Processing functions at the agency as well as consortium level		Current	Implemented
1.2.2.1 Rename Alerts section on Caseload Management page (66)	The Alerts header on the Caseload Management page should be renamed to better reflect the actual functionality on the page.		Current	Implemented

1.2.3 Document Management (67)	CWW should be enhanced to allow workers to manage the Document Management functions at the agency as well as consortium level		Current	Implemented	
1.2.3.1 Search Document Management page by consortia (68)	CWW should be enhanced to allow searching through the Document Management page by consortia		Current	Implemented	
1.2.3.2 Search Document Management by multiple agencies within a consortium (69)	CWW should be enhanced to allow searching through the Document Management page by multiple agencies within a consortium selected by the worker in the search criteria		Current	Implemented	
1.2.3.3 Search Document Management by agency (70)	CWW should retain the ability to allow searching through the Document Management page by agency		Current	Implemented	
1.2.3.4 Remove Office restriction for the Document Reassignment (71)	The Document Management page should not require the user to limit documents to a specific office when reassigning documents	This functionality would be useful for change centers that process documents across multiple offices.	Current	Implemented	
1.3 Interfaces (72)	Where appropriate, interfaces with external systems should be updated to send county of residence, in place of managing county, for consortia managed cases	This is important for cases that have been transferred to a county outside of the household's county of residence for purposes of case leveling within a consortia	Current	Implemented	
1.4 System Access, Security, and Administrative Structure (73)	The System Access, Security, and Administrative Structure should be enhanced to support the IM Regionalization work model		Current	Implemented	
1.4.1 Streamlined process for obtaining or changing application security access (74)	The process for obtaining or changing the application security access should be made more efficient. The application form for getting access can be made easier to fill and process by security officers	No system changes are currently planned to implement this requirement	Current	No System change Required	
1.4.2 Case Security and Access (75)	The system should provide any consortium worker with the ability to update any IM case which resides in any county that is a part of the consortia (excluding confidential cases which will continue to be accessed by their existing security access logic) .	All consortium workers will have all IM offices within the consortium added to their worker ID The security logic for accessing confidential cases will be maintained as-is	Current	Implemented	
1.4.3 WISA Enhancements for better management of consortium worker profiles (76)	WISA should be enhanced to have an efficient process of addition and deletion of all offices within a specified consortium to a worker ID		Current	Implemented	
1.4.4 Sharing of workload between consortia (77)	The system should allow a consortium to share the workload with another consortium if requested		Current	No System change Required	
1.4.4.1 Temporary worker ID for helping another consortium (78)	If a consortium A seeks help from another consortium B to share their workload, the recommendation is that workers from consortium B will need to request a temporary consortium A worker ID	No system changes will be made for this requirement Assumption: Workers would get the same security profile as their current consortium worker ID on a newly requested ID for a different consortium	Current	No System change Required	
1.5 Client Scheduling (79)	The Client Scheduling function should support the consortium model by continuing to allow workers to create or update appointments on calendars of other workers in the same or different offices and counties	No system changes will be made with respect to the Client Scheduling functionality	Current	No System change Required	
1.6 Communication (80)	ACCESS and Correspondences should be enhanced to display the relevant contact information to support the IM Regionalization work model		Current	Implemented	

1.6.1 Return addresses on IM and mixed correspondence for consortia (81)	The system should display the CDPU's mailing address as the return address on all IM and shared notices of agencies which are a part of a consortium	The DCF notices for these agencies will continue to show existing return addresses MilES notices will continue to display existing MilES return addresses If any tribes choose to not be a part of the consortia and the CDPU, their notices would continue to have their existing return addresses displayed Exception for shared correspondences (SMRF, VCL, Case Summary (revised)) If SMRF, VCL and Case Summary are generated only for DCF program then existing DCF return address will be displayed on them	Current	Implemented	
1.6.2 New document type for returned (undeliverable) mail (82)	This system should have a new document type which can be used by the CDPU workers to scan returned (undeliverable) mail	The return mail would be scanned by the CDPU workers using ScanFirst. It would appear as an Unprocessed Document on the home page of the workers (primary and/or FEP, CC worker) assigned to the case (or per the Document Routing Rules of the agency)	Current	Implemented	
1.6.3 IM and mixed correspondence phone and fax numbers (83)	The system should print the new phone and fax numbers for each consortium wherever applicable on all IM and mixed correspondence		Current	Implemented	
1.6.4 Consortia name on IM and mixed correspondence (84)	The system should display both the agency and consortia name on all IM and mixed correspondence in the Change Center section	Recommendation: Change the Office name to be a combination of both County and Consortia name (40 character limit). E.g. "DANE PART OF SOUTHEAST CONSORTIA"	Current	Implemented	
1.6.5 Phone and fax numbers in ACCESS (85)	The system should print the new phone and fax numbers for each consortium wherever applicable in ACCESS		Current	Implemented	
1.6.6 Consortium names in ACCESS (86)	The system should display both the agency and consortia name in ACCESS in the Change Center section wherever applicable		Current	Implemented	
1.6.7 ACCESS agency contact information (87)	The system will support the agency contact information in the Am I Eligible (AIE), Apply For Benefits (AFB), Renew My Benefits (RMB), Report My Changes (RMC), Check My Benefits (CMB) systems in ACCESS to be updated as per the needs of the consortia	The agency contact information in CMB would need to be refreshed for all CMB accounts after any change to the contact information is made in CARES	Current	Implemented	
1.7 Reporting (88)			Current	Implemented	
1.7.1 Maintain existing EOS reports for the counties (89)	The existing EOS reports should be maintained as-is in the system at the county level		Current	Implemented	

1.7.2 Extend ESC/MilES reports to the consortia (90)	The following ESC/MilES reports should be generated at the consortia level and provided to all the consortia: 1) ESC and MilES executive dash board - Untimely details 2) ESC and MilES executive dash board report 3) Case Due Date Report 4) MilES - ESC Inbox Item Report		Current	Implemented	
1.7.3 Report for admin renewals (91)	A new report is requested for the consortia for cases which are subject to admin renewals		Future	Outstanding	
1.8 Other Requirements (92)	The following system enhancements should be made as a part of the IM Regionalization changes		Current	Implemented	
1.8.1 Display information on a confidential case (93)	CWW should display the assigned worker, county and consortia on the case summary page of a confidential case to be visible to all workers		Current	Implemented	
1.8.2 Display consortia name on the Individual Summary page (94)	CWW should be enhanced to display the consortia name on the Individual Summary page		Current	Implemented	
1.8.3 Display consortia name on the Individual Search Results page (95)	CWW should be enhanced to display the consortia name on the Individual Search Results page		Current	Implemented	
1.8.4 Correct threshold amount displayed on Notices of decision for an FS/BadgerCare case (96)	The system should be enhanced to show the correct threshold amount for an FS/BadgerCare case while reporting a change		Current	Implemented	
1.8.5 New Indicator on FoodShare Budget page (97)	The system should display an indicator on the FoodShare Budget page when the income exceeds the 130 % threshold for the case when running with dates		Current	Implemented	
1.8.6 Better connection between CARES and KIDS (98)	The system should warn the worker if the absent parent's address matches the primary person's address on any CWW case	July 2012 item	Future	Outstanding	
1.8.7 Core Plan Fee waived for Verified Tribal Members During Review (99)	The system should be enhanced to waive the Core Plan fee for verified tribal members during renewal	The Core Plan Details page needs to support a new 'fee waived' instruction for tribal members	Current	Implemented	
1.8.8 Display program information on ACCESS Renewal PDF (100)	The ACCESS Renewal PDF should display the names of programs which are being renewed		Current	Implemented	
1.8.9 Display program information on Change/Renewal/SMRF Summary page (101)	The Change/Renewal/SMRF Summary page should display the names of programs which are being renewed		Current	Implemented	
1.8.10 Core Plan Fee Alert Change (102)	The system needs to be enhanced to make the Core Plan Fee alert show up again if it is deleted by a worker without any action being taken	July 2012 item	Future	Outstanding	
1.8.11 Opt-out agencies (103)	The system will retain the existing capability to manage all IM workload at the agency level to allow agencies which opt out of forming consortia to manage IM programs	No system changes will be made with respect to opt-out agencies	Current	Implemented	
1.8.12 SeniorCare (104)	The system would support the SeniorCare county 73 to continue operating as a part of a single agency consortium		Current	No System change Required	
1.8.13 Other consortia types (105)	The system should be flexible to support any new consortia types to be added in the future	e.g. W2 consortia	Current	Implemented	
1.8.14 Agencies moving between consortia (106)	The system should be flexible to allow any agency to move from one consortium to another		Current	Implemented	
1.8.15 Agency Document Routing Rules (107)	The system should retain its existing ability to allow creation and management of Document Routing Rules at the agency level	No system changes will be made for Jan 2012	Current	No System change Required	
1.8.16 Language Changes on Document Tracking Sheet (108)	The language on the Document Tracking Sheet (DTS) should be changed to emphasize the necessity of using the DTS for all forms of submission in order to improve automated document indexing	This item could be implemented earlier than Jan 2012	Current	Implemented	
1.8.17 FSET Referrals (109)	The AIWP mainframe screen should be enhanced to allow workers to override the office to the correct associated Work Program office	This system change PCR would be created by DHS but the change would be performed by DCF	Current	Implemented	
1.8.18 Client Scheduling tool with enhanced worker function (110)	The system should be enhanced to integrate advanced client scheduling functions for consortium workers	March 2012 item	Future	Scheduled	08/25/2012
1.8.19 Client Scheduling tool for members (111)	The system should be enhanced to integrate advanced client scheduling functions in ACCESS to allow members and applicants to schedule appointments online	July 2012 item	Future	Outstanding	
1.8.20 Worker Dashboard (112)	The system should be enhanced by integrating a new worker dashboard to efficiently manage caseloads and workload and measure performance	July 2012 item	Future	Scheduled	08/25/2012
1.8.21 Performance measurement tool - IM Scorecard (113)	The IM Scorecard should be enhanced to measure performance in a more effective manner	July 2012 item	Future	Outstanding	
1.8.22 IMQA Enhancements for second party review (114)	The system should be enhanced to better track quality of IM case administration	July 2012 item	Future	Scheduled	08/25/2012

1.8.23 Case Identifier for Fair Hearing cases (115)	The system should be enhanced to identify cases which are being worked on for Fraud, Fair Hearings or Problem Resolution	July 2012 item	Future	Outstanding	
1.8.24 Benefit Recovery Enhancements (116)	The system should be enhanced to provide better tools for benefit recovery functions	July 2012 item	Future	Outstanding	
1.8.25 Fair Hearing tracking in CARES (117)	The system should be enhanced in order to track Fair Hearings and associated documents effectively in CARES	July 2012 item	Future	Scheduled	12/07/2012
1.9 ESC Transition (118)	The system should be enhanced to support the transition of all workload from the ESC to the counties/consortia		Current	Implemented	
1.9.1 Support the administration of Badger Plus Core Plan in county agencies/consortia (119)	CWW should be enhanced to support the administration of BadgerCare Plus Core Plan in county agencies/consortia		Current	Implemented	
1.9.1.1 Allow county/consortia workers to modify Core Plan information (120)	CWW should be modified to allow county/consortia workers to modify/collect Core Plan information, including Health Needs Assessments and Fee Payments		Current	Implemented	
1.9.1.2 Modify System IDs of county/consortia workers for managing Core Plan (121)	System IDs for county/consortia workers should be modified to provide access to Core Plan system functions		Current	Implemented	
1.9.1.3 Application, Renewals and Case Search for Core Plan (122)	CWW should be modified to allow county/consortia workers to search for applications, renewals, and cases having specific Core Plan criteria		Current	Implemented	
1.9.1.4 Confirmation of Core Plan Cases by county workers (123)	CWW should be enhanced to allow county workers to confirm Core Plan cases		Current	Implemented	
1.9.1.5 Allow Face to Face interviews to be scheduled for Core Plan Phone Renewals (124)	CWW should be enhanced to add a Face to Face Interview Type on the Interview Details page for Core Plan Phone Renewals		Current	Implemented	
1.9.1.6 Remove ESC Screening option from the Individual Summary page (125)	CWW should be enhanced to remove the ESC Screening option from the Individual Summary page for all county workers. For ESC Workers, the option should continue to display until a specified date stored in a reference table.		Current	Implemented	
1.9.1.7 Remove ESC Screening option from the Potential Individual Matches page (126)	CWW should be enhanced to remove the ESC Screening option from the Potential Individual Matches page for all county workers. For ESC Workers, the option should continue to display until a specified date stored in a reference table.		Current	Implemented	
1.9.2 Modify ACCESS routing logic (127)	ACCESS should be modified to allow applications that are currently routed to the ESC to route to the county/consortia of the Primary Person's county of residence; the new routing should begin on a date specified via reference table		Current	Implemented	
1.9.3 Modify Case Transfer Notice (128)	The text on the case transfer notice may need to be reworded to reduce customer confusion and county/consortia disruption during the transfer of cases from the ESC to the county/consortia		Current	Implemented	
1.9.4 Transfer remaining cases and discontinue ESC from system (129)	After all active and closed cases have been transferred from the ESC to the counties/consortia, CWW should no longer display ESC as an option for county (future release)		Future	Implemented	
1.9.5 Remove ESC references from ACCESS pages and help (130)	ESC-specific instructions/language/addresses should no longer display in ACCESS, when routing is changed to the counties/consortia		Future	Implemented	
1.9.6 Systematic Transfer of ESC Cases (131)	The system should provide a capability to transfer cases from the ESC to the county consortia in bulk, based on review date or SMRF due date and other case characteristics	January/February 2012 item	Current	Implemented	